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**Welcome to the Vaccine Management Portal!**

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ARIZONA DEPARTMENT  
OF HEALTH SERVICES

## Table of Contents

|   |    |
|---|----|
| -- Purpose --                                     | 2  |
| -- Overview --                                    | 2  |
| -- Portal Baseline Features --                    | 2  |
| -- Guide Updates --                               | 2  |
| -- Creating and Accessing Admin Portal Account -- | 3  |
| -- Adding an OU Admin --                          | 4  |
| -- Adding Staff to the System --                  | 5  |
| -- Adding and Maintaining Sites --                | 6  |
| -- Adding Inventory to a Site --                  | 9  |
| -- Exporting Site Inventory --                    | 12 |
| --Adding and Maintaining Vaccine Programs--       | 13 |
| --Assigning Staff to an Event--                   | 29 |
| --Private Event--                                 | 31 |
| -- Publishing an Event --                         | 32 |
| -- Appendix --                                    | 33 |
| PATIENT BULK UPLOAD INSTRUCTIONS                  | 33 |
| STAFF BULK UPLOAD INSTRUCTIONS                    | 34 |

## **-- Purpose --**

The purpose of this User Guide is to provide detailed information for Organization and Site administrators to carry out the tasks and responsibilities of their roles.

## **-- Overview --**

The primary responsibilities of the Organization Admin are to add and maintain Sites, Staff, Events and Vaccine Programs at the organization level. The Site Admin has similar responsibilities at the site level. Two notable differences between the roles:

- Site Admins will not add or manage Organization Admins.
- Site Admins will manage only Sites and Events assigned to them.

The Organization Admin is responsible for configuring the system and providing oversight across all areas or regions within their organization. The Organization Admin also has the ability to manage user accounts and roles across the organization.

## **-- Portal Baseline Features --**

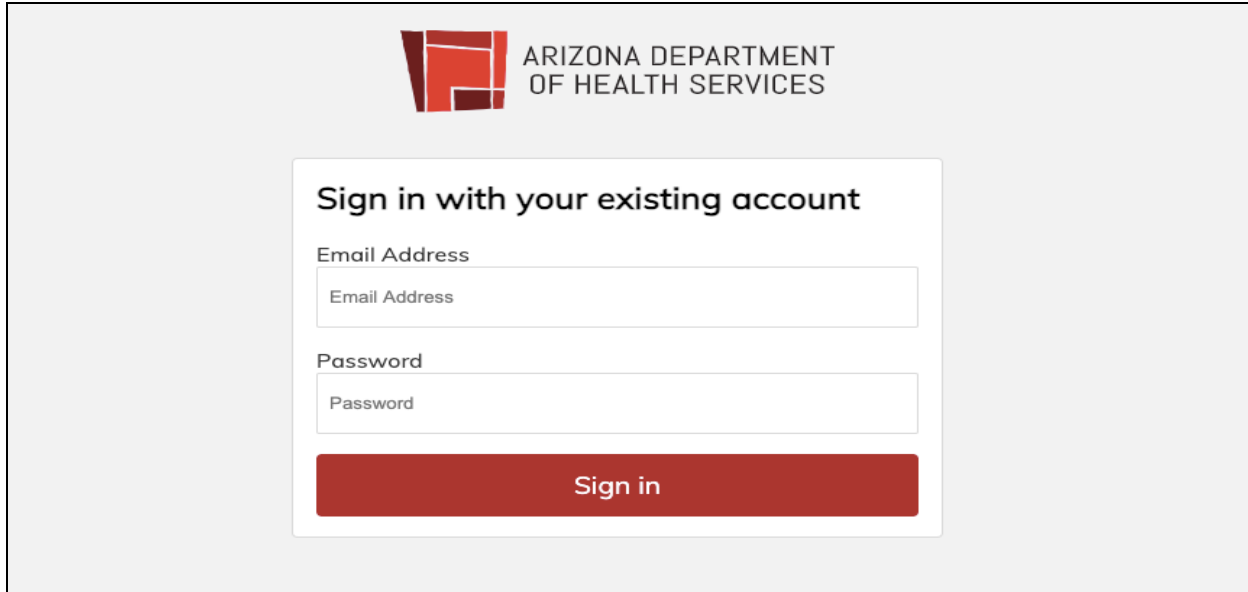
- Logging into the Admin Portal
- Add OU Admins
- Add Staff Members
- Add/Maintain Sites
- Allocate Inventory to a Site
- Add/Maintain Vaccine Programs
- Create Events
- Assign Staff to an Event

## **-- Guide Updates --**

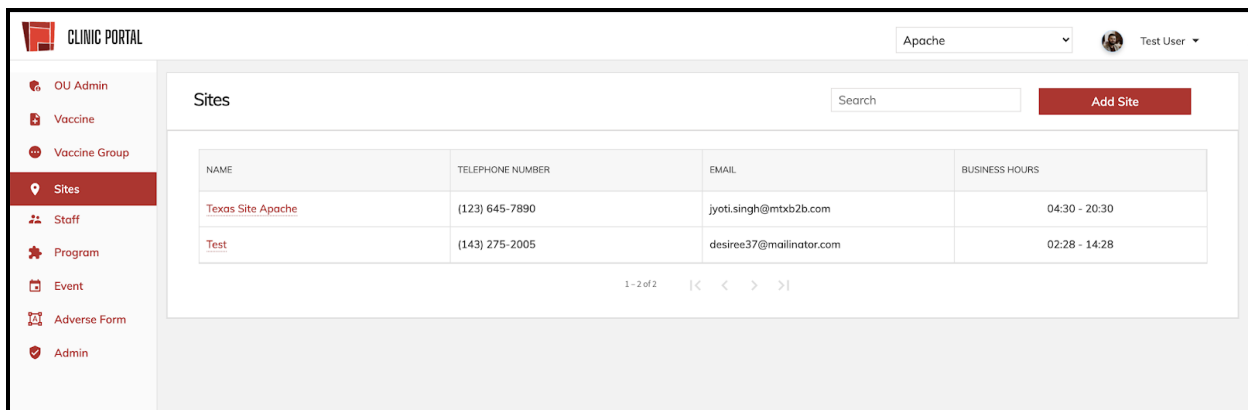
Due to ongoing system enhancements, the user may discover that some features function differently than outlined in this guide. This guide will continue to be updated to reflect the most recent enhancements. For this reason, it is suggested that you access the guide online (instead of printing or downloading) so that you are always reviewing the most recent version.

## -- Creating and Accessing Admin Portal Account --

1. **Log into the Admin Portal** using your organization Admin credentials sent to your registered email address.



2. Once logged in, the Sites page will display by default. To navigate between different Health Clinics (areas or regions), click the dropdown from the upper right-hand corner of the portal (to the left of your login name). Select the Health Clinic that you wish to view.

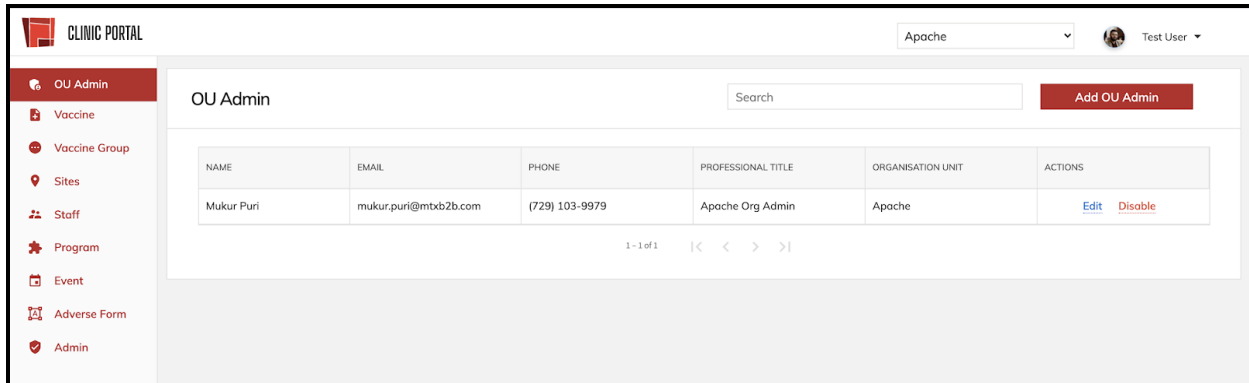


| NAME              | TELEPHONE NUMBER | EMAIL                    | BUSINESS HOURS |
|-------------------|------------------|--------------------------|----------------|
| Texas Site Apache | (123) 645-7890   | jyoti.singh@mtxb2b.com   | 04:30 - 20:30  |
| Test              | (143) 275-2005   | desiree37@mailinator.com | 02:28 - 14:28  |

## -- Adding an OU Admin --

(This section applies to OU Admins only)

1. Click the **OU Admin** tab on the left menu bar. All OU Admins previously entered for this site will display on the table. To add a new OU Admin, click on **Add OU Admin**.



CLINIC PORTAL

Apache Test User

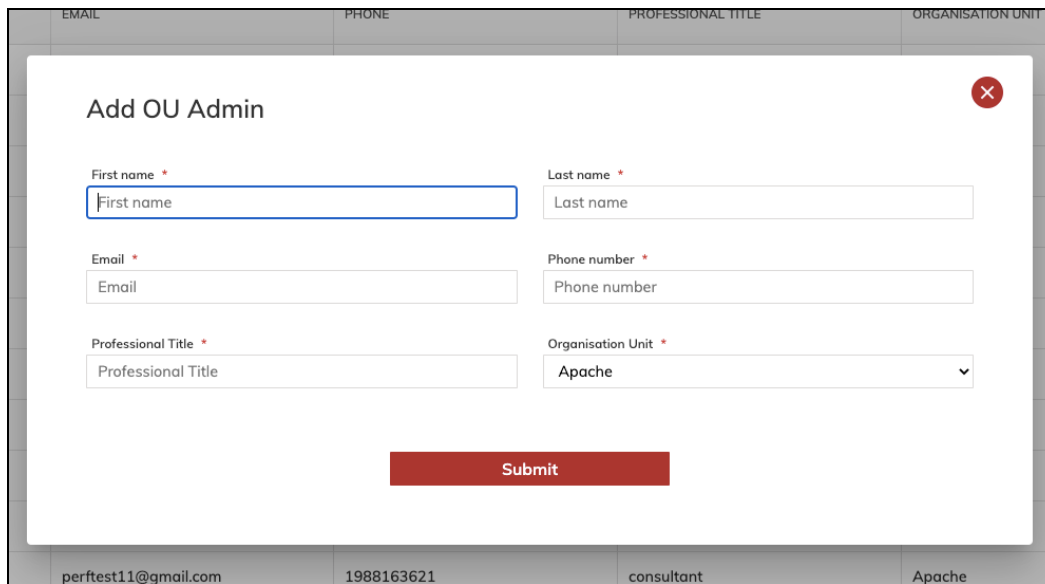
OU Admin

Search Add OU Admin

| NAME       | EMAIL                 | PHONE          | PROFESSIONAL TITLE | ORGANISATION UNIT | ACTIONS                                      |
|------------|-----------------------|----------------|--------------------|-------------------|--|
| Mukur Puri | mukur.puri@mtxb2b.com | (729) 103-9979 | Apache Org Admin   | Apache            | <a href="#">Edit</a> <a href="#">Disable</a> |

1 - 1 of 1

2. Complete all the fields in the screen. Once completed, click **Submit** to save the new OU Admin entry.



Add OU Admin

First name \* Last name \*

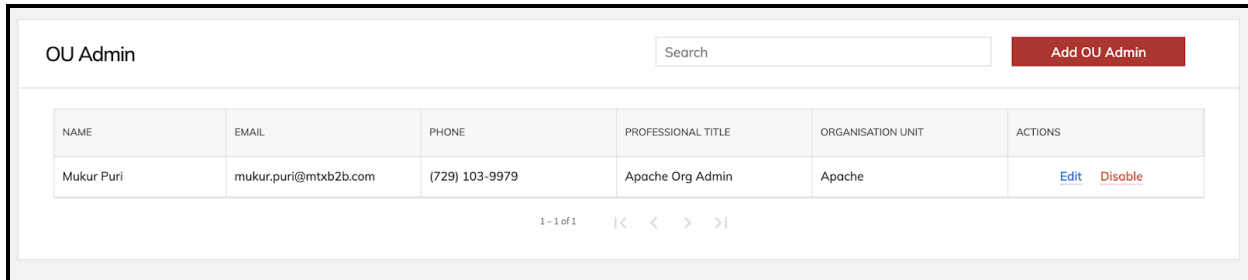
Email \* Phone number \*

Professional Title \* Organisation Unit \*

Submit

perftest11@gmail.com 1988163621 consultant Apache

3. You also have the ability to edit user details (Click **Edit**) and disable accounts (Click **Disable**).



OU Admin

Search

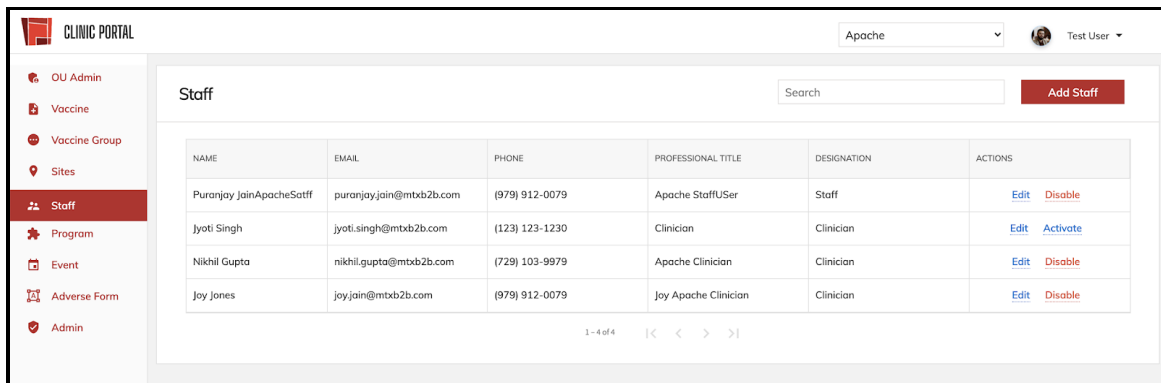
Add OU Admin

| NAME       | EMAIL                 | PHONE          | PROFESSIONAL TITLE | ORGANISATION UNIT | ACTIONS                                      |
|------------|-----------------------|----------------|--------------------|-------------------|--|
| Mukur Puri | mukur.puri@mtxb2b.com | (729) 103-9979 | Apache Org Admin   | Apache            | <a href="#">Edit</a> <a href="#">Disable</a> |

1 - 1 of 1

## -- Adding Staff to the System --

1. Click the **Staff** tab on the left menu bar. All staff members previously entered into the system will display on the table. To add a new Staff Member, click on **Add Staff**.



CLINIC PORTAL

Apache

Test User

OU Admin

Vaccine

Vaccine Group

Sites

**Staff**

Program

Event

Adverse Form

Admin

Staff

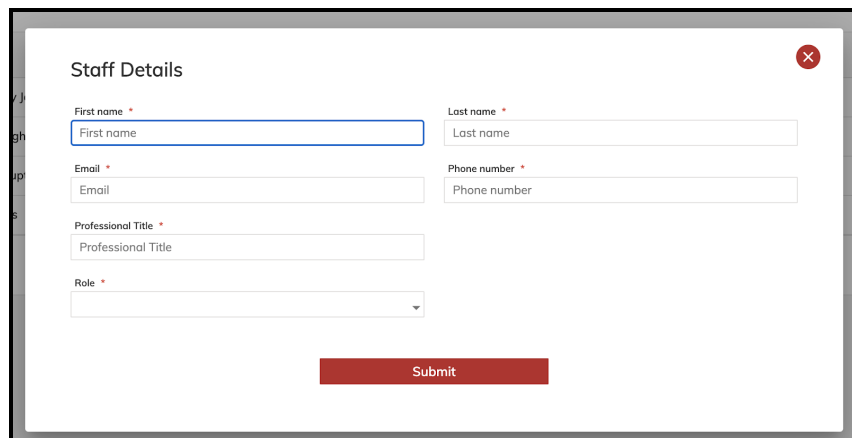
Search

Add Staff

| NAME                     | EMAIL                    | PHONE          | PROFESSIONAL TITLE   | DESIGNATION | ACTIONS                                       |
|--------------------------|--------------------------|----------------|----------------------|-------------|---|
| Puranjay JainApacheStaff | puranjay.jain@mtxb2b.com | (979) 912-0079 | Apache StaffUser     | Staff       | <a href="#">Edit</a> <a href="#">Disable</a>  |
| Jyoti Singh              | jyoti.singh@mtxb2b.com   | (123) 123-1230 | Clinician            | Clinician   | <a href="#">Edit</a> <a href="#">Activate</a> |
| Nikhil Gupta             | nikhil.gupta@mtxb2b.com  | (729) 103-9979 | Apache Clinician     | Clinician   | <a href="#">Edit</a> <a href="#">Disable</a>  |
| Joy Jones                | joy.jain@mtxb2b.com      | (979) 912-0079 | Joy Apache Clinician | Clinician   | <a href="#">Edit</a> <a href="#">Disable</a>  |

1 - 4 of 4

2. Complete all the fields in the Staff Details screen for each Staff Member. Once entered, click **Submit**. An email will be sent inviting the Staff Member to register for the portal.



Staff Details

First name \*

Last name \*

Email \*

Phone number \*

Professional Title \*

Role \*

Submit

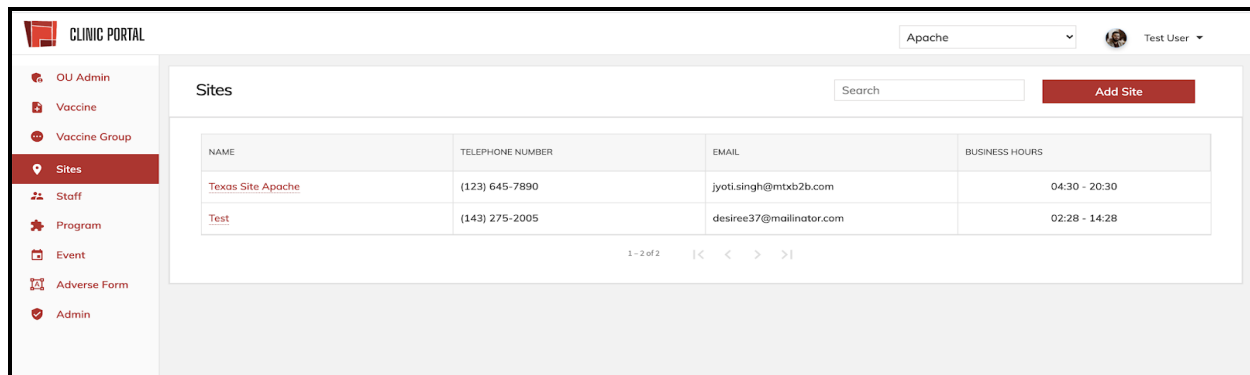
- The newly added Staff Member will display on the table. You can edit member details (click **Edit**) and Disable their account (click **Disable**) at any time.

| NAME              | EMAIL                           | PHONE          | PROFESSIONAL TITLE | DESIGNATION | ACTIONS  |
|-------------------|---------------------------------|----------------|--------------------|-------------|--|
| Arpit Khuraswar   | arpit.khuraswar@mailinator.com  | +1111232313231 | Front desk admin   | Staff       | <a href="#">Reset</a> <a href="#">Edit</a> <a href="#">Disable</a> |
| Khuban Hussain    | khuban.hussain@mtxb2b.com       | 1541751100     | Vaccinator         | Staff       | <a href="#">Reset</a> <a href="#">Edit</a> <a href="#">Disable</a> |
| Arpit CK          | arpit.khuraswar@mtxb2b.com      | 7347882338     | RegNurse           | Staff       | <a href="#">Reset</a> <a href="#">Edit</a> <a href="#">Disable</a> |
| Arpit K           | arpitck@gmail.com               | 7347882338     | Doc                | Clinician   | <a href="#">Reset</a> <a href="#">Edit</a> <a href="#">Disable</a> |
| Arpit Khuraswar   | arpit.khuraswar1@mailinator.com | +111121231231  | Doctor             | Clinician   | <a href="#">Reset</a> <a href="#">Edit</a> <a href="#">Disable</a> |
| Test Staff        | teststaff@mtxb2b.com            | 1565656565     | Head nurse         | Staff       | <a href="#">Reset</a> <a href="#">Edit</a> <a href="#">Disable</a> |
| Shivam Singh      | shivam.singh@mtxb2b.com         | 2564646464     | Head Nurse         | Staff       | <a href="#">Reset</a> <a href="#">Edit</a> <a href="#">Disable</a> |
| Emily Labattaglia | emily.labattaglia@mtxb2b.com    | 1231231212     | Staff              | Clinician   | <a href="#">Reset</a> <a href="#">Edit</a> <a href="#">Disable</a> |
| Emily Labattaglia | test@mailinator.com             | 1231234545     | adsfasdf           | Clinician   | <a href="#">Reset</a> <a href="#">Edit</a> <a href="#">Disable</a> |
| Charles James     | vincentterri@mailinator.com     | 1541752150     | Manager            | Clinician   | <a href="#">Reset</a> <a href="#">Edit</a> <a href="#">Disable</a> |

Click here to view [Staff Bulk Upload Instructions](#).

## -- Adding and Maintaining Sites --

- Click the **Sites** tab on the left menu bar. To add a new Site, click on **Add Site**.



The screenshot shows the CLINIC PORTAL interface. On the left is a sidebar menu with options: OU Admin, Vaccine, Vaccine Group, **Sites** (highlighted), Staff, Program, Event, Adverse Form, and Admin. The main content area is titled 'Sites' and includes a search bar and an 'Add Site' button. Below this is a table with the following data:

| NAME              | TELEPHONE NUMBER | EMAIL                    | BUSINESS HOURS |
|-------------------|------------------|--------------------------|----------------|
| Texas Site Apache | (123) 645-7890   | iyoti.singh@mtxb2b.com   | 04:30 - 20:30  |
| Test              | (143) 275-2005   | desiree37@mailinator.com | 02:28 - 14:28  |

At the bottom of the table, there is a pagination indicator: '1 - 2 of 2' and navigation arrows.

- Complete all of the required fields in the Clinic Details screen. Required fields are marked with a red asterisk (\*). Scroll down to complete all fields. Once complete, scroll down and click **Submit**.

- The newly added Site will display on the Sites table. To view a site that was previously entered click on the site name in the Name column.

| Sites             |                  |                          |                |
|-------------------|------------------|--------------------------|----------------|
|                   |                  | Search                   | Add Site       |
| NAME              | TELEPHONE NUMBER | EMAIL                    | BUSINESS HOURS |
| Texas Site Apache | (123) 645-7890   | jyoti.singh@mtxb2b.com   | 04:30 - 20:30  |
| Test              | (143) 275-2005   | desiree37@mailinator.com | 02:28 - 14:28  |

1 - 2 of 2 |< < > >|

- The site will display as in the screenshot below. To update any site details, click on the **Clinic Info** tab and click **Edit**.





5. The screen below will display. Edit the fields you want to change, then scroll down to click **Submit** to save.

Site Details

Name \*  
St Vincent Private Hospital

Email \*  
deven.dhaka+vincent@mtxb2b.com

Phone Number \*  
0415162418

Business Start Time \*  
09:00

Business End Time \*  
17:00

Facility ID \*  
FID1234

Address  
Enter a location

Street \*  
St Vincent's Private Hospital, Melbourne, East Melbourne

City \*  
East Melbourne

Suite/Apt  
Suite/Apt

State \*  
Victoria

Country \*  
Australia

Postcode \*  
3002

Each Site will display an **Inventory tab**. You have the ability to monitor inventory levels, download exports, as well as add new inventory for the specified Site. Adding inventory to a Site is covered in the next section 'Adding Inventory to a Site'.

Clinic Info **Inventory** Site Admin

Stock Details

Search

Export Data

Add New

| NAME                | LOT NUMBER | EXPIRATION DATE | ACTION               |
|---------------------|------------|-----------------|----------------------|
| Influenza Vaccine 2 | 22         | 12-31-2020      | <a href="#">Edit</a> |
| Influenza Vaccine1  | 12         | 12-23-2020      | <a href="#">Edit</a> |

1 - 2 of 2 |< < > >|

Under the **Site Admin** tab, you will be able to view all of the Staff that has been assigned to work an event at the particular Site. Assigning Staff to an Event is covered in the section 'Adding an Event'.

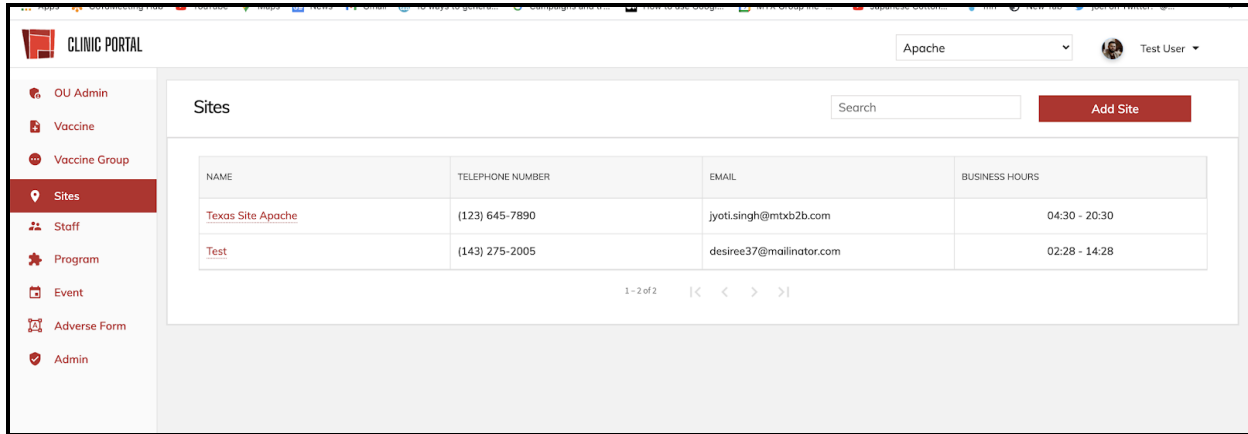
Clinic Info Inventory **Site Admin**

Site Admin

| NAME | EMAIL | PHONE | PROFESSIONAL TITLE |
|------|-------|-------|--------------------|
|------|-------|-------|--------------------|

## -- Adding Inventory to a Site --

1. Click the **Sites** tab on the left menu bar.



CLINIC PORTAL

Apache Test User

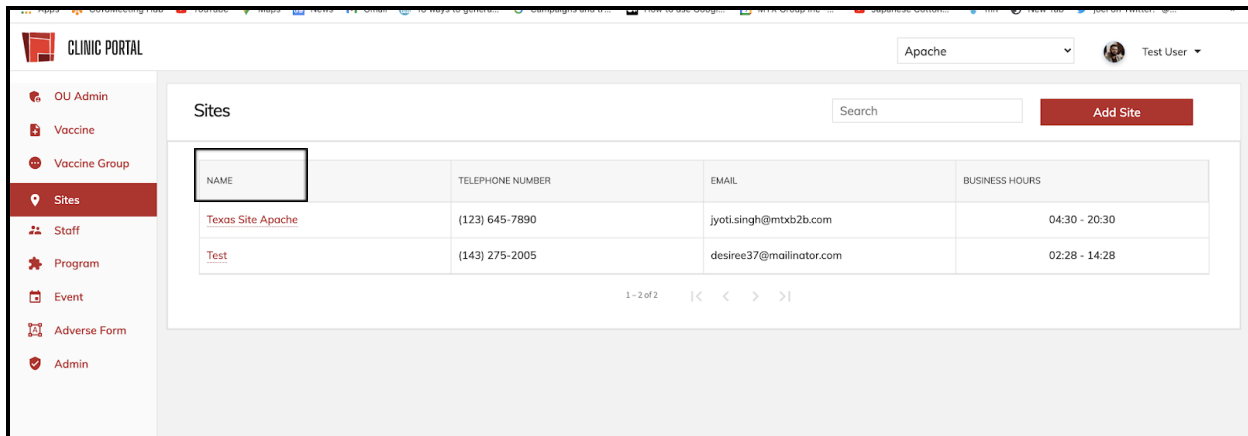
Sites

Search Add Site

| NAME              | TELEPHONE NUMBER | EMAIL                    | BUSINESS HOURS |
|-------------------|------------------|--------------------------|----------------|
| Texas Site Apache | (123) 645-7890   | jyoti.singh@mtxb2b.com   | 04:30 - 20:30  |
| Test              | (143) 275-2005   | desiree37@mailinator.com | 02:28 - 14:28  |

1 - 2 of 2 |< < > >|

2. Click on the site name you would like to add inventory to.



CLINIC PORTAL

Apache Test User

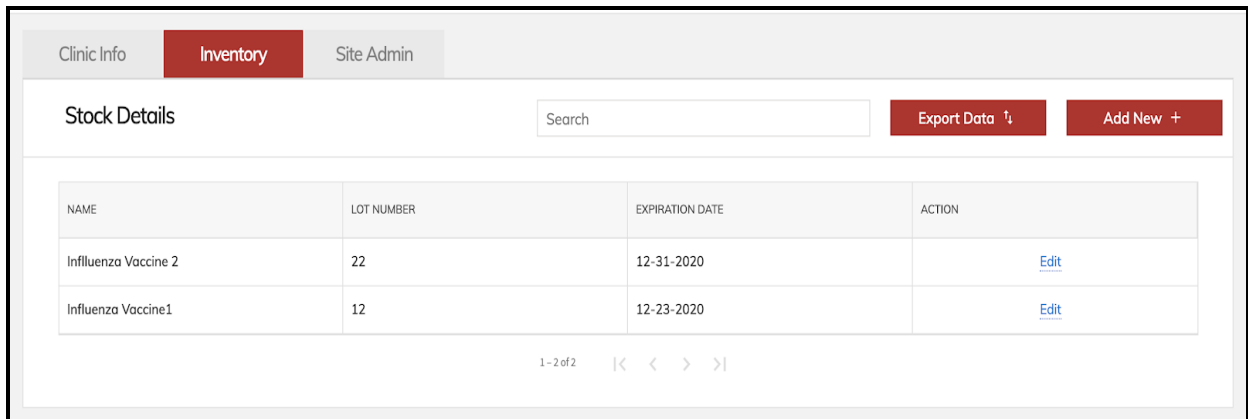
Sites

Search Add Site

| NAME              | TELEPHONE NUMBER | EMAIL                    | BUSINESS HOURS |
|-------------------|------------------|--------------------------|----------------|
| Texas Site Apache | (123) 645-7890   | jyoti.singh@mtxb2b.com   | 04:30 - 20:30  |
| Test              | (143) 275-2005   | desiree37@mailinator.com | 02:28 - 14:28  |

1 - 2 of 2 |< < > >|

3. Click on the **Inventory** tab for the site. To add new Inventory, click on **Add New**.



Clinic Info Inventory Site Admin

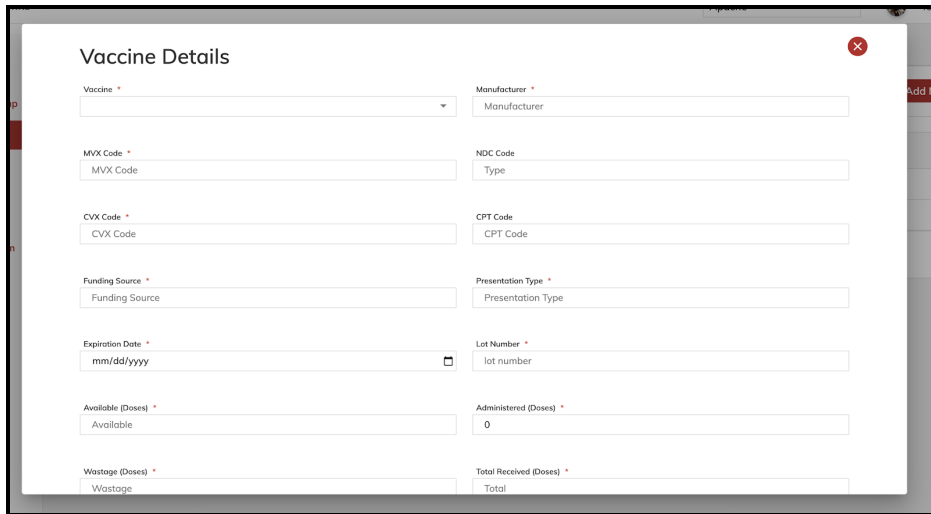
Stock Details

Search Export Data Add New

| NAME                | LOT NUMBER | EXPIRATION DATE | ACTION               |
|---------------------|------------|-----------------|----------------------|
| Influenza Vaccine 2 | 22         | 12-31-2020      | <a href="#">Edit</a> |
| Influenza Vaccine1  | 12         | 12-23-2020      | <a href="#">Edit</a> |

1 - 2 of 2 |< < > >|

- Click the Vaccine dropdown to select the Vaccine and enter all of the required fields. Required fields are marked with a red asterisk (\*). Once complete, scroll down and click **Submit**.



**Vaccine Details**

Vaccine \*

Manufacturer \*

MVX Code \*

NDC Code

CVX Code \*

CPT Code

Funding Source \*

Presentation Type \*

Expiration Date \*

Lot Number \*



Available (Doses) \*

Administered (Doses) \*

Wastage (Doses) \*

Total Received (Doses) \*

- Once saved, the newly added inventory will display on the Stock Details table. To update inventory details, click on **Edit**.

| Clinic Info Inventory Site Admin |            |   |   |
|----------------------------------|------------|---|---|
| Stock Details                    |            | Search  | Export Data  |
|                                  |            | Add New  |   |
| NAME                             | LOT NUMBER | EXPIRATION DATE   | ACTION  |
| Influenza Vaccine 2              | 011        | 09-08-2021  | <a href="#">Edit</a>  |
| Influenza Vaccine 2              | 22         | 12-31-2020  | <a href="#">Edit</a>  |
| Influenza Vaccine1               | 12         | 12-23-2020  | <a href="#">Edit</a>  |

1 - 3 of 3 |< < > >|

6. A Vaccine Details pop-up will display. Edit the inventory detail fields as appropriate. Scroll down and click **Submit** to save changes.

Vaccine \*

Influenza Vaccine 2

Manufacturer \*

Influenza

MVX Code \*

55

NDC Code

5

CVX Code \*

5

CPT Code

5

Funding Source \*

State

Presentation Type \*

Influenza v2

Expiration Date \*

09/08/2021

Lot Number \*

011

Available (Doses) \*

323

Administered (Doses) \*

0

Wastage (Doses) \*

1

Total Received (Doses) \*

324

## -- Exporting Site Inventory --

1. Click on the **Inventory** tab then click **Export Data**.

Clinic Info
**Inventory**
Site Admin

Stock Details

Export Data <sup>1</sup>


Add New +

| NAME            | LOT NUMBER | EXPIRATION DATE | ACTION               |
|-----------------|------------|-----------------|----------------------|
| Vaccine final 2 | 1          | 12-14-2020      | <a href="#">Edit</a> |

1 - 1 of 1

2. Click **Show All Exports**.

Export Started !!



Show All Exports

3. A CSV file has been created for you. Click **Download** to download the exported Inventory document.

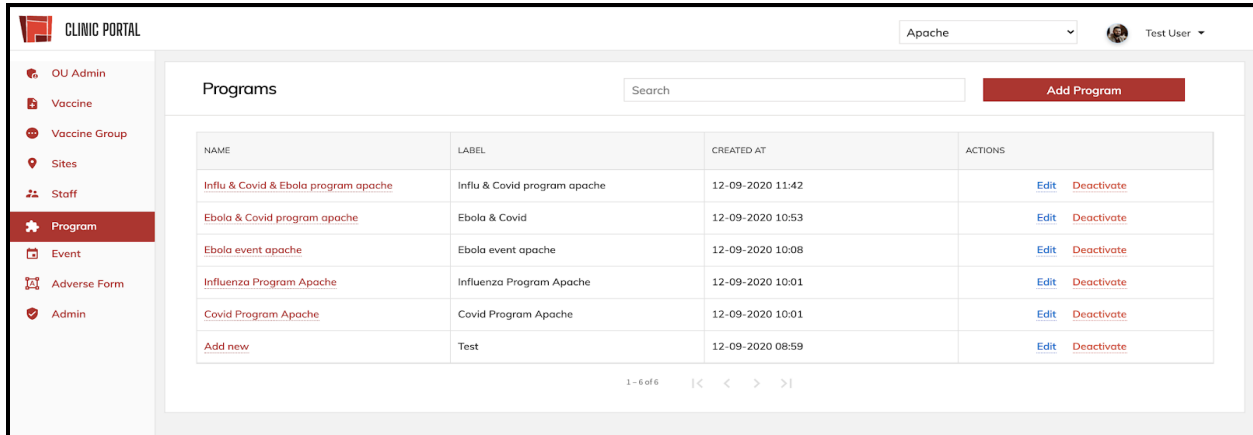
Patients Invite
Staff Upload
**Admin Exports**

Export Requests

| ID  | REQUEST TYPE | DATE REQUESTED ON | REQUEST STATUS | ACTIONS                  |
|-----|--------------|-------------------|----------------|--------------------------|
| 183 | Inventory    | 12-15-2020        | COMPLETED      | <a href="#">Download</a> |
| 182 | Inventory    | 12-15-2020        | COMPLETED      | <a href="#">Download</a> |
| 172 | Inventory    | 12-14-2020        | COMPLETED      | <a href="#">Download</a> |

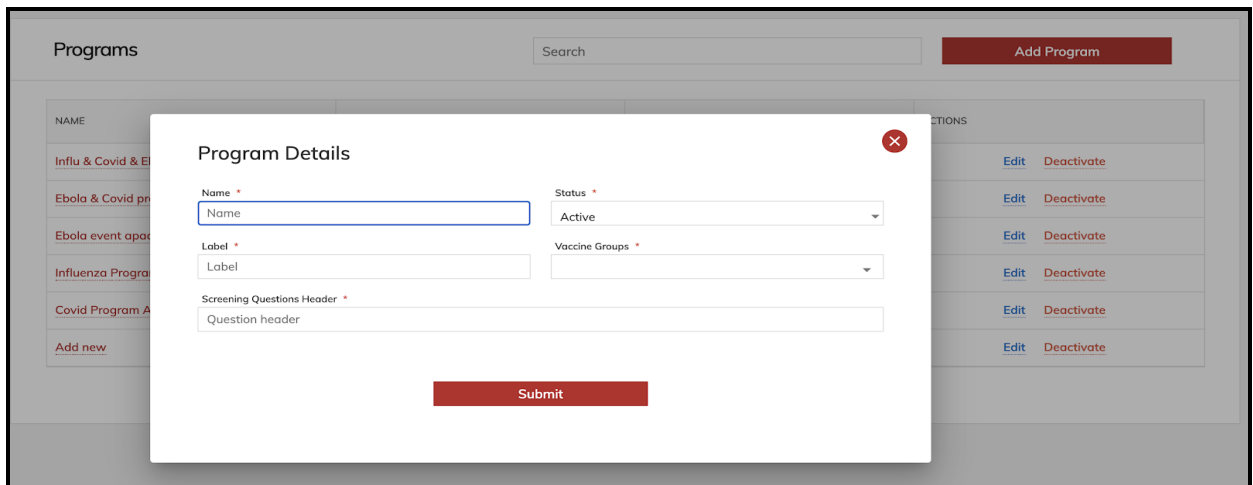
## --Adding and Maintaining Vaccine Programs--

1. Click the **Program** tab from the left menu bar. The page below will display. Click on **Add Program** to create a new program.



| NAME   | LABEL                        | CREATED AT       | ACTIONS   |
|--|------------------------------|------------------|---|
| <a href="#">Influ &amp; Covid &amp; Ebola program apache</a> | Influ & Covid program apache | 12-09-2020 11:42 | <a href="#">Edit</a> <a href="#">Deactivate</a> |
| <a href="#">Ebola &amp; Covid program apache</a>             | Ebola & Covid                | 12-09-2020 10:53 | <a href="#">Edit</a> <a href="#">Deactivate</a> |
| <a href="#">Ebola event apache</a>                           | Ebola event apache           | 12-09-2020 10:08 | <a href="#">Edit</a> <a href="#">Deactivate</a> |
| <a href="#">Influenza Program Apache</a>                     | Influenza Program Apache     | 12-09-2020 10:01 | <a href="#">Edit</a> <a href="#">Deactivate</a> |
| <a href="#">Covid Program Apache</a>                         | Covid Program Apache         | 12-09-2020 10:01 | <a href="#">Edit</a> <a href="#">Deactivate</a> |
| <a href="#">Add new</a>                                      | Test                         | 12-09-2020 08:59 | <a href="#">Edit</a> <a href="#">Deactivate</a> |

2. Complete all fields of the Program Details screen. Click **Submit** and a new Program has been created.



**Program Details**

Name \*

Label \*

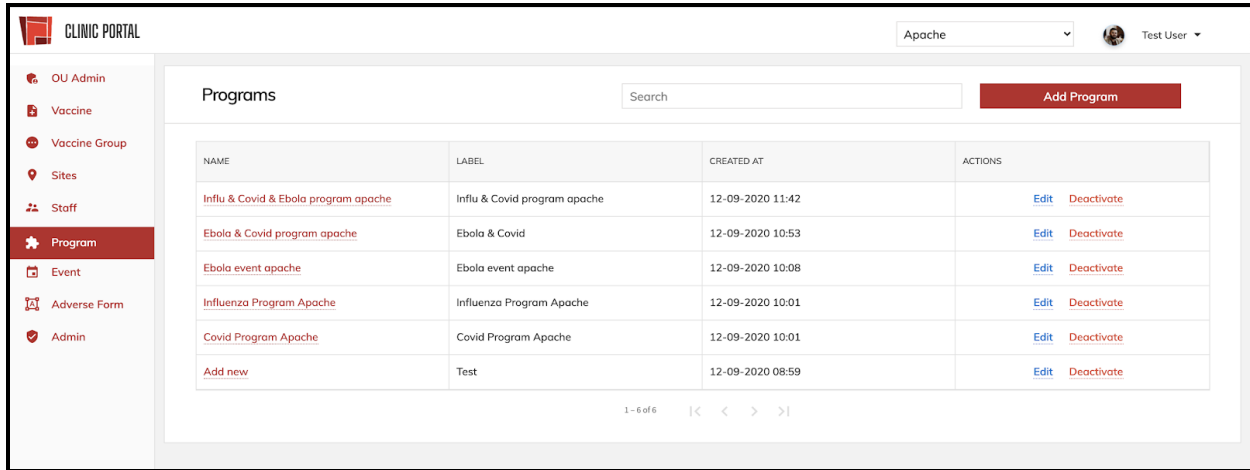
Status \*

Vaccine Groups \*

Screening Questions Header \*

**Submit**

- You have the option to edit the existing details for the program or deactivate the program by clicking the **Edit** or **Deactivate** button.

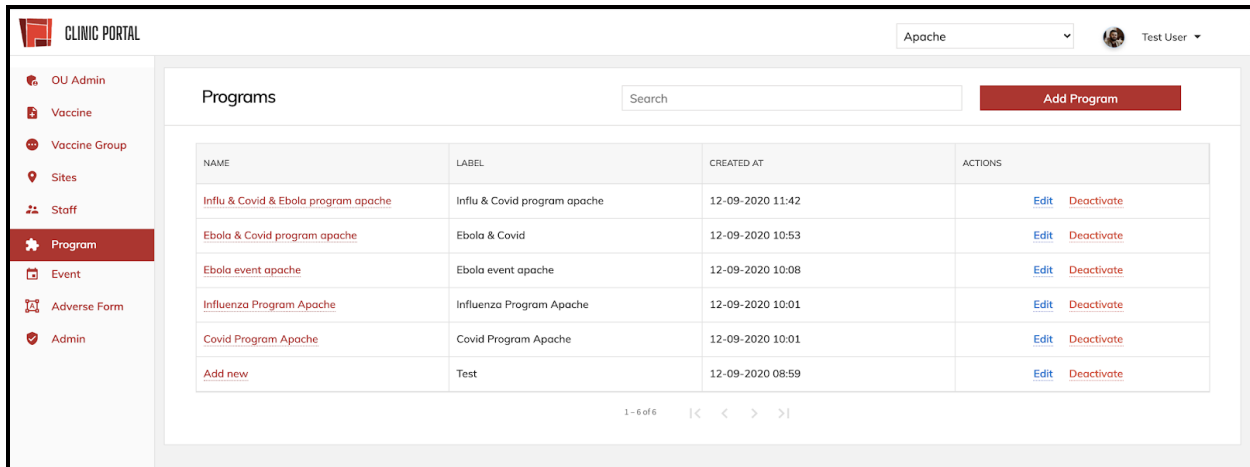


The screenshot shows the 'CLINIC PORTAL' interface. On the left is a sidebar with navigation links: OU Admin, Vaccine, Vaccine Group, Sites, Staff, Program (highlighted), Event, Adverse Form, and Admin. The main content area is titled 'Programs' and includes a search bar and an 'Add Program' button. Below this is a table with the following data:

| NAME   | LABEL                        | CREATED AT       | ACTIONS   |
|--|------------------------------|------------------|---|
| <a href="#">Influ &amp; Covid &amp; Ebola program apache</a> | Influ & Covid program apache | 12-09-2020 11:42 | <a href="#">Edit</a> <a href="#">Deactivate</a> |
| <a href="#">Ebola &amp; Covid program apache</a>             | Ebola & Covid                | 12-09-2020 10:53 | <a href="#">Edit</a> <a href="#">Deactivate</a> |
| <a href="#">Ebola event apache</a>                           | Ebola event apache           | 12-09-2020 10:08 | <a href="#">Edit</a> <a href="#">Deactivate</a> |
| <a href="#">Influenza Program Apache</a>                     | Influenza Program Apache     | 12-09-2020 10:01 | <a href="#">Edit</a> <a href="#">Deactivate</a> |
| <a href="#">Covid Program Apache</a>                         | Covid Program Apache         | 12-09-2020 10:01 | <a href="#">Edit</a> <a href="#">Deactivate</a> |
| <a href="#">Add new</a>                                      | Test                         | 12-09-2020 08:59 | <a href="#">Edit</a> <a href="#">Deactivate</a> |

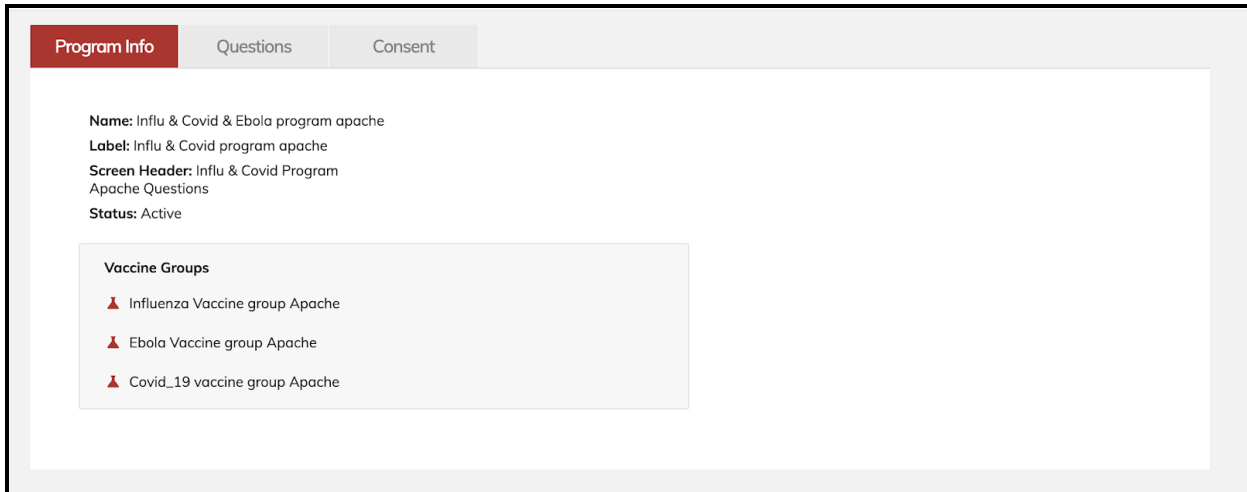
At the bottom of the table, there is a pagination indicator '1 - 6 of 6' and navigation arrows.

- To add screening questions or configure consent, click on the program name from the Name column.



This screenshot is identical to the one above, showing the 'CLINIC PORTAL' interface with the 'Programs' table. The table contains the same data as the previous screenshot, including the 'Add new' row at the bottom. The sidebar, search bar, and pagination are also identical.

5. The screen below will display. To manage screening questions, click the **Questions** tab.



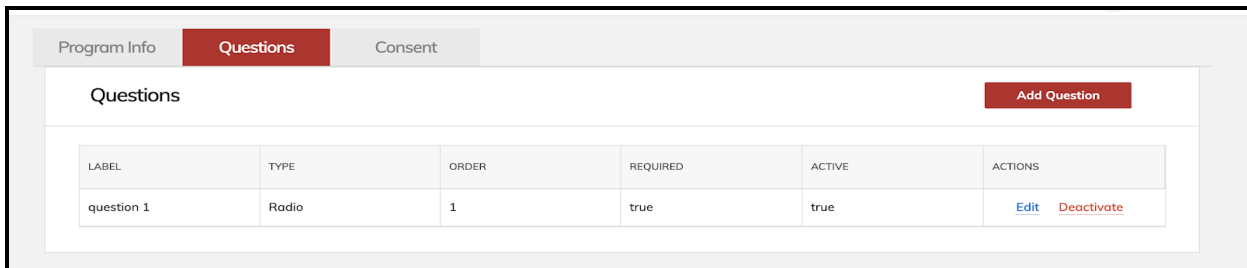
**Program Info** Questions Consent

**Name:** Influenza & Covid & Ebola program apache  
**Label:** Influenza & Covid program apache  
**Screen Header:** Influenza & Covid Program Apache Questions  
**Status:** Active

**Vaccine Groups**

- ▲ Influenza Vaccine group Apache
- ▲ Ebola Vaccine group Apache
- ▲ Covid\_19 vaccine group Apache

6. Click **Add Question** to add screening questions. The screening questions will display on the patient portal after the patient selects the program when scheduling an appointment.



**Program Info** **Questions** Consent

Questions [Add Question](#)

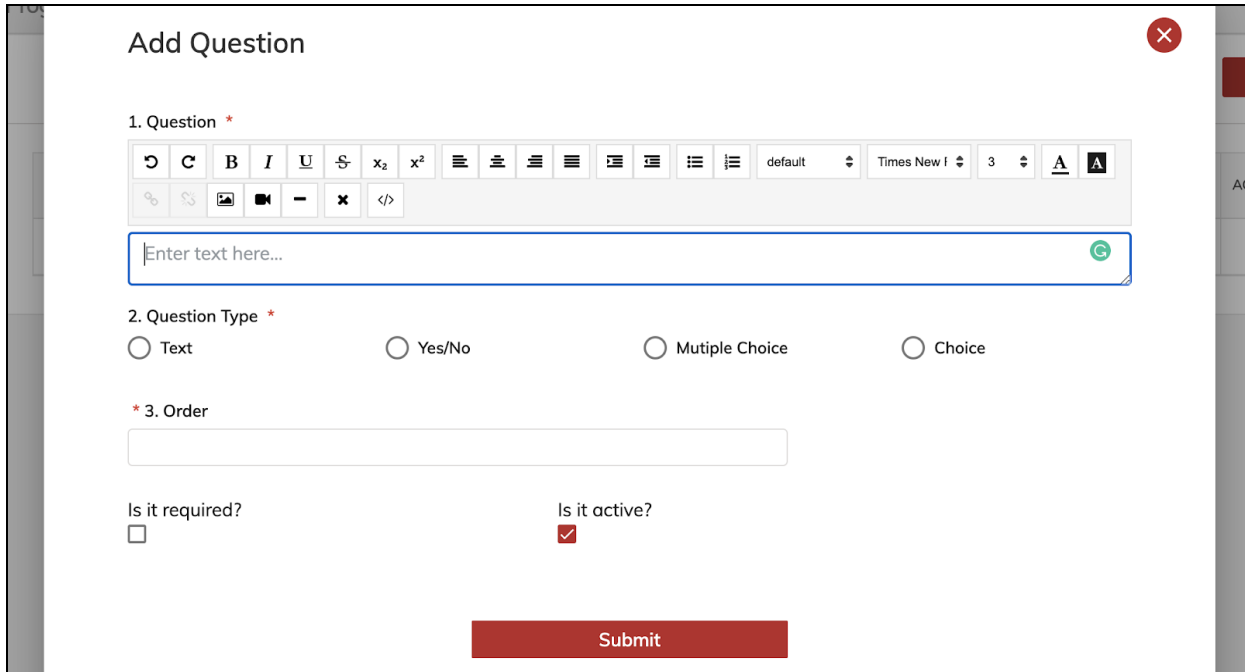
| LABEL      | TYPE  | ORDER | REQUIRED | ACTIVE | ACTIONS   |
|------------|-------|-------|----------|--------|---|
| question 1 | Radio | 1     | true     | true   | <a href="#">Edit</a> <a href="#">Deactivate</a> |



- Type in the screening question you would like to add and complete all of the fields. When done, click **Submit**.

**Note:** The “Is it required?” checkbox should be marked if the respondent will be required to fill out this question.

Manually click the “Is it active?” checkbox to activate the question so that it is included with the screening questions shown to patients. If the “Is it Active?” checkbox is unchecked, that question will not be included with the list of screening questions shown to patients.



**Add Question**

1. Question \*

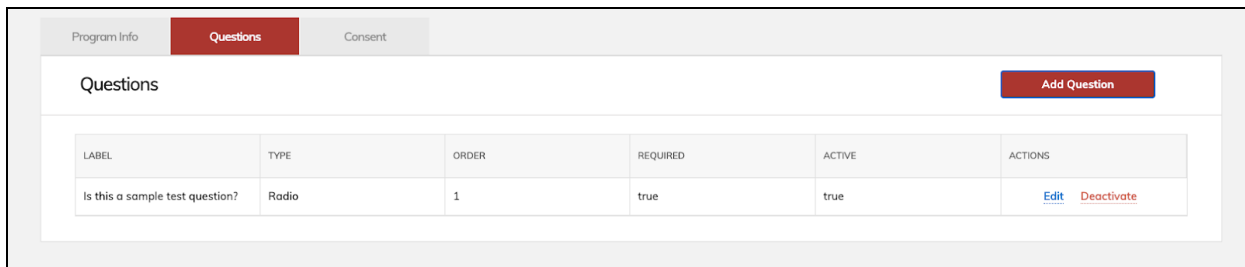
2. Question Type \*

☐ Text ☐ Yes/No ☐ Multiple Choice ☐ Choice

\* 3. Order

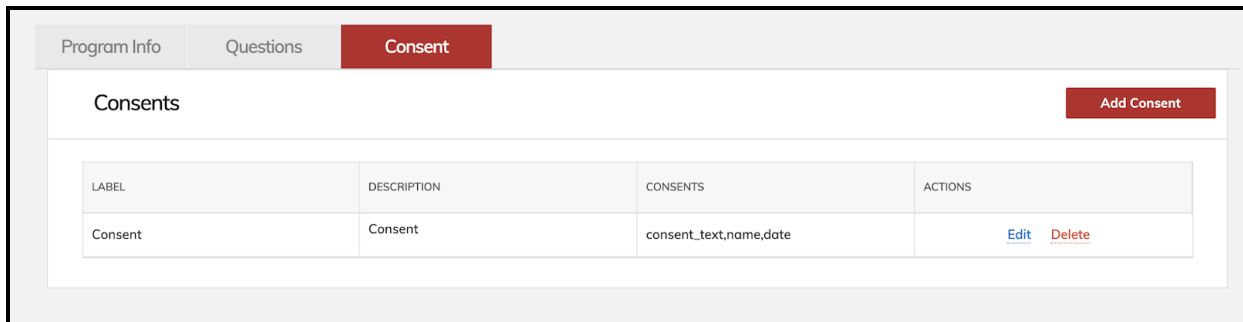
Is it required? ☐ Is it active? ☒

**Submit**



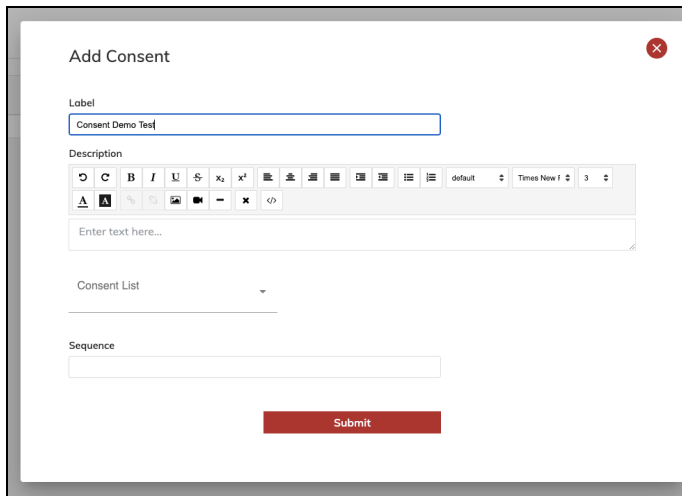
| Questions                       |       |       |          |        |   |
|---------------------------------|-------|-------|----------|--------|---|
| LABEL                           | TYPE  | ORDER | REQUIRED | ACTIVE | ACTIONS   |
| Is this a sample test question? | Radio | 1     | true     | true   | <a href="#">Edit</a> <a href="#">Deactivate</a> |

8. You can edit and remove questions as needed by clicking the **Edit** button and updating the information within the Question screen.
9. Click the **Consent** tab to configure the Patient Consent details required for this particular program. The consent will display on the Patient Consent screen while scheduling an appointment. To begin, click **Add Consent**.



| LABEL   | DESCRIPTION | CONSENTS               | ACTIONS                                     |
|---------|-------------|------------------------|---|
| Consent | Consent     | consent_text,name,date | <a href="#">Edit</a> <a href="#">Delete</a> |

10. In the **Label** field, enter the title of the consent.



Add Consent

Label  
Consent Demo Test

Description  
Enter text here...

Consent List

Sequence

Submit

11. In the **Description** field, enter the consent text that the patient will read on the patient portal.

**Add Consent**

Label  
Consent Demo Test

Description

I attest that I have read the terms and conditions and that I have...

Consent List

Sequence

Submit

12. The **Consent List** field has a drop down to select the information that should show on the Consent Page. Select the information you want to display (you can click more than one option).

Consent List

Consent List

☒ Consent Text

☐ Name

☐ Date

13.The **Sequence** field will determine the order your consent message(s) will display. Use the up and down arrows to order the consents. If there is only one consent, “1” should display in the **Sequence** field. When done click **Submit**.

Sequence

1

Submit

14. The new Consent(s) will display in the table.

Program Info

Questions

Consent

Consents

Add Consent

| LABEL             | DESCRIPTION   | CONSENTS               | ACTIONS                                     |
|-------------------|---|------------------------|---|
| Consent Demo Test | I attest that I have read the terms and conditions and that I have... | consent_text,name,date | <a href="#">Edit</a> <a href="#">Delete</a> |

## --Adding an Event--

1. To manage events, click the 'Events' tab on the left menu bar. To add an event, click **Add Event**.

CLINIC PORTAL

Apache Test User

Events

Search Add Event

| EVENT ID | EVENT                                      | SITE NAME         | PROGRAM                              | START DATE | PRIORITY GROUP   | END DATE   | STATUS    | ACTIONS     |
|----------|--|-------------------|--------------------------------------|------------|--|------------|-----------|-------------|
| 2        | Covid event Apache                         | Texas Site Apache | Covid Program Apache                 | 10-09-2020 | 1A_Healthcare_practitioners,1A_Healthcare_support,1A_Skilled_nursing | 12-31-2020 | PUBLISH   | Delete      |
| 3        | Influenza event apache                     | Texas Site Apache | Influenza Program Apache             | 12-09-2020 | 1B_Essential_workers,1C_Increased_risk                               | 12-20-2020 | PUBLISH   | Delete      |
| 5        | Multi Event Testing with No priority Group | Texas Site Apache | Ebola & Covid program apache         | 12-09-2020 |  | 12-30-2020 | PUBLISH   | Delete      |
| 6        | Multi Event Testing 2                      | Texas Site Apache | Influenza Program Apache             | 12-01-2020 |  | 12-31-2020 | PUBLISH   | Delete      |
| 4        | Ebola & Covid event                        | Texas Site Apache | Ebola & Covid program apache         | 12-09-2020 |  | 12-25-2020 | PUBLISH   | Delete      |
| 8        | Scheduler Event Testing                    | Texas Site Apache | Add new                              | 12-01-2020 |  | 12-05-2020 | UNPUBLISH | Edit Delete |
| 7        | Ebola, Infl, Covid event Apache            | Texas Site Apache | Influ & Covid & Ebola program apache | 12-09-2020 |  | 12-09-2020 | PUBLISH   | Delete      |

1 - 7 of 7

2. The Event Details screen will display. **Complete the required fields** (marked with a red asterisk). Select a Program to associate with this event from the Program dropdown list containing the previously entered Programs. Click **Submit**.

If you don't see a Program listed, it needs to be created by going back to the **Program** tab and clicking **Add Program**.

**Note:** The start date, start time, end date, and end time apply to the dates and business hours during which the event will be operational.

The slot frequency will determine the amount of time each appointment will run. For example, if you want to add slot frequency as 60 minutes (you will just need to type the number "60" in the **Slot Duration** field) and start time is 9 AM, while end time is 5 PM, the appointments will be booked for one hour each as - 9 AM - 10 AM, 10 AM -11 AM, and so on, till 4 PM - 5 PM.

Event Details

Event name \*

Test Event 37

Program \*

Program : Pfizer

Site \*

Warrior site

Priority Group

Email \*

Email

Phone number \*

(456) 345-2333

Start date \*

12/17/2020

End date \*

12/18/2020

Start time \*

09:00 AM

End time \*

05:00 PM

Slot Duration \*

60

Search Address

Bisbee, Arizona, USA

Address \*

Address

Street

Street

City \*

City

Suite/Apt

Suite/Apt

County \*

State \*

State

Zip code \*

Zip code

Description

Description

POC Contact Name

Contact Name

POC Contact Number

Contact Phone Number

Type \*

Public

3. Choose the type of event by selecting either Public or Private in the Type field.

Type \*

Public

Private

An event will be created and displayed on the Event list view, as shown in the screenshot below.

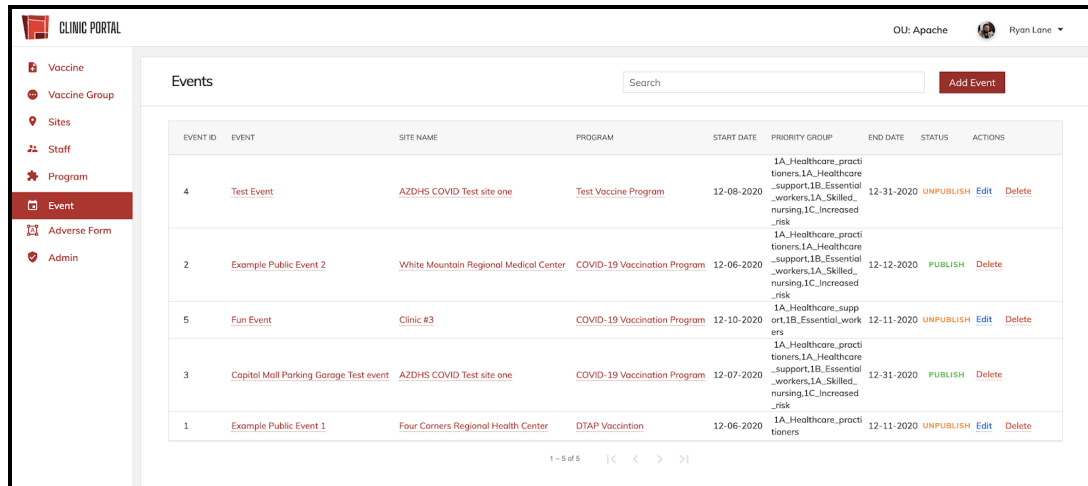
**Note: Newly created Events will default to 'UNPUBLISH'. When you're ready for the event to be available for patients to book, you will need to manually update the status to PUBLISH.**

**Please ensure the details of an event have been finalized before publishing.**

You can unpublish an event to change the start and end time, extend the start and end date or edit the number of available slots. No other changes can be made.

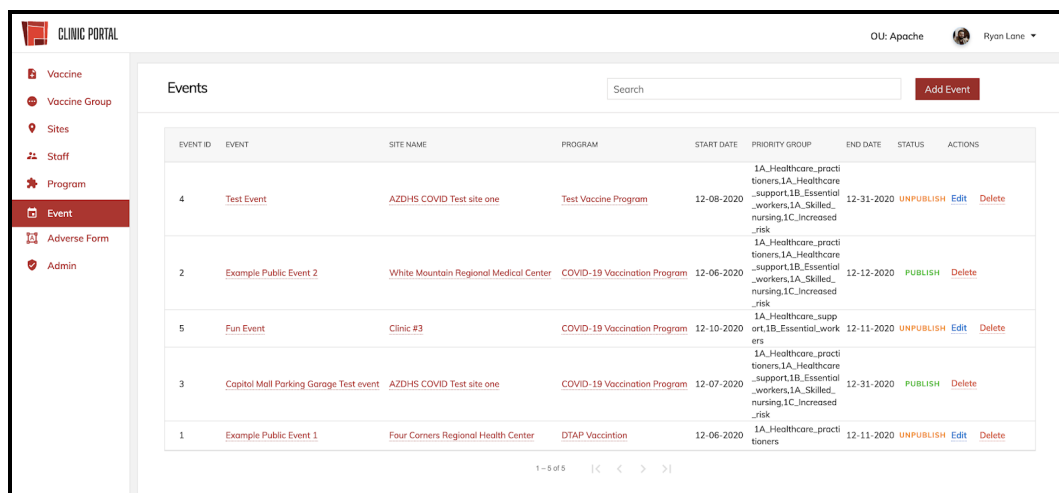
Any time you unpublish an event (even if it is temporary to edit an event), it will be unavailable for the public to book until the status is updated to PUBLISH again.

Instructions for changing the status to PUBLISH are detailed in the [Publish an Event](#) section at the end of this User Guide.



| EVENT ID | EVENT  | SITE NAME                              | PROGRAM                      | START DATE | PRIORITY GROUP  | END DATE   | STATUS    | ACTIONS                                     |
|----------|--|--|------------------------------|------------|---|------------|-----------|---|
| 4        | <a href="#">Test Event</a>                             | AZDHS COVID Test site one              | Test Vaccine Program         | 12-08-2020 | 1A_Healthcare_practitioners,1A_Healthcare_support,1B_Essential_workers,1A_Skilled_nursing,1C_Increased_risk | 12-31-2020 | UNPUBLISH | <a href="#">Edit</a> <a href="#">Delete</a> |
| 2        | <a href="#">Example Public Event 2</a>                 | White Mountain Regional Medical Center | COVID-19 Vaccination Program | 12-06-2020 | 1A_Healthcare_practitioners,1A_Healthcare_support,1B_Essential_workers,1A_Skilled_nursing,1C_Increased_risk | 12-12-2020 | PUBLISH   | <a href="#">Delete</a>                      |
| 5        | <a href="#">Fun Event</a>                              | Clinic #3                              | COVID-19 Vaccination Program | 12-10-2020 | 1A_Healthcare_support,1B_Essential_workers  | 12-11-2020 | UNPUBLISH | <a href="#">Edit</a> <a href="#">Delete</a> |
| 3        | <a href="#">Capitol Mall Parking Garage Test event</a> | AZDHS COVID Test site one              | COVID-19 Vaccination Program | 12-07-2020 | 1A_Healthcare_practitioners,1A_Healthcare_support,1B_Essential_workers,1A_Skilled_nursing,1C_Increased_risk | 12-31-2020 | PUBLISH   | <a href="#">Delete</a>                      |
| 1        | <a href="#">Example Public Event 1</a>                 | Four Corners Regional Health Center    | DTAP Vaccination             | 12-06-2020 | 1A_Healthcare_practitioners   | 12-11-2020 | UNPUBLISH | <a href="#">Edit</a> <a href="#">Delete</a> |

- To set the number of appointments that will be available for patients to book for each time slot or to assign staff, click on the name of the event in the Event column.



| EVENT ID | EVENT  | SITE NAME                              | PROGRAM                      | START DATE | PRIORITY GROUP  | END DATE   | STATUS    | ACTIONS                                     |
|----------|--|--|------------------------------|------------|---|------------|-----------|---|
| 4        | <a href="#">Test Event</a>                             | AZDHS COVID Test site one              | Test Vaccine Program         | 12-08-2020 | 1A_Healthcare_practitioners,1A_Healthcare_support,1B_Essential_workers,1A_Skilled_nursing,1C_Increased_risk | 12-31-2020 | UNPUBLISH | <a href="#">Edit</a> <a href="#">Delete</a> |
| 2        | <a href="#">Example Public Event 2</a>                 | White Mountain Regional Medical Center | COVID-19 Vaccination Program | 12-06-2020 | 1A_Healthcare_practitioners,1A_Healthcare_support,1B_Essential_workers,1A_Skilled_nursing,1C_Increased_risk | 12-12-2020 | PUBLISH   | <a href="#">Delete</a>                      |
| 5        | <a href="#">Fun Event</a>                              | Clinic #3                              | COVID-19 Vaccination Program | 12-10-2020 | 1A_Healthcare_support,1B_Essential_workers  | 12-11-2020 | UNPUBLISH | <a href="#">Edit</a> <a href="#">Delete</a> |
| 3        | <a href="#">Capitol Mall Parking Garage Test event</a> | AZDHS COVID Test site one              | COVID-19 Vaccination Program | 12-07-2020 | 1A_Healthcare_practitioners,1A_Healthcare_support,1B_Essential_workers,1A_Skilled_nursing,1C_Increased_risk | 12-31-2020 | PUBLISH   | <a href="#">Delete</a>                      |
| 1        | <a href="#">Example Public Event 1</a>                 | Four Corners Regional Health Center    | DTAP Vaccination             | 12-06-2020 | 1A_Healthcare_practitioners   | 12-11-2020 | UNPUBLISH | <a href="#">Edit</a> <a href="#">Delete</a> |

- To add availability for the appointment time slots for an event, click on the name of the event. The screen below will display. Click the **Scheduler** Tab.

Event Info

Scheduler

Staff

Invitee

Covid event Apache

Covid event apache

Program: [Covid Program Apache](#)

Site: [Texas Site Apache](#)

Date: 10-09-2020 - 12-31-2020

Timing: 15:35 - 20:35

Contact: (123) 645-7890

Email: jyoti.singh@mtxb2b.com

Status: Approved

Unpublish

2400 Aviation Dr, DFW Airport, TX 75261, USA Dallas/Fort Worth International Airport DFW Airport, Texas 75261

- The following screen will display. Click the calendar icon on the right side of the screen and select the date you want to set availability for.

Event Info

Scheduler

Staff

Invitee

|       | 12-16-2020                    | 12-17-2020                    | 12-18-2020                    |
|-------|-------------------------------|-------------------------------|-------------------------------|
| 14:34 | AVAILABLE<br>0<br>BOOKED<br>0 | AVAILABLE<br>0<br>BOOKED<br>0 | AVAILABLE<br>0<br>BOOKED<br>0 |
| 14:49 | AVAILABLE<br>0<br>BOOKED<br>0 | AVAILABLE<br>0<br>BOOKED<br>0 | AVAILABLE<br>0<br>BOOKED<br>0 |
| 15:04 | AVAILABLE<br>0<br>BOOKED<br>0 | AVAILABLE<br>0<br>BOOKED<br>0 | AVAILABLE<br>0<br>BOOKED<br>0 |
| 15:19 | AVAILABLE<br>0<br>BOOKED<br>0 | AVAILABLE<br>0<br>BOOKED<br>0 | AVAILABLE<br>0<br>BOOKED<br>0 |
| 15:34 | AVAILABLE<br>0<br>BOOKED<br>0 | AVAILABLE<br>0<br>BOOKED<br>0 | AVAILABLE<br>0<br>BOOKED<br>0 |
|       | AVAILABLE<br>0                | AVAILABLE<br>0                | AVAILABLE<br>0                |

12/16/2020

December 2020

|    |    |    |    |    |    |    |
|----|----|----|----|----|----|----|
| S  | M  | T  | W  | T  | F  | S  |
| 29 | 30 | 1  | 2  | 3  | 4  | 5  |
| 6  | 7  | 8  | 9  | 10 | 11 | 12 |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | 31 | 1  | 2  |
| 3  | 4  | 5  | 6  | 7  | 8  | 9  |

Today



- The screen will update to display the current schedule for that date. The appointment reflects the slot duration configured in the Event configuration. We will now review the steps for allocating the number of appointments for the time slots.

There are three methods you can use to select the number of time slots to add availability to. For each of the methods, when you select a time slot to edit, it will display in yellow. Once you select the slots you want to add availability for, you will type in the number of appointments you want to be available for that selection into the “Enter new value” field and finally, you will click **Update**.

You will choose the method that best meets your needs and saves you the most time! Next, we’ll detail each method.

### Method 1: Allocating for One Date and Time

- Click box for the date and time you wish to add availability to. In the example below, 12/16/20 at 8:35am has been chosen.

You will see the highlighted box is yellow, letting you know that you’ve only selected this date and time.

Event Info

Scheduler

Staff

Invitee

12/16/2020

|       | 12-16-2020   | 12-17-2020   | 12-18-2020   |
|-------|--|--|--|
| 08:35 | <div>AVAILABLE</div> <div>0</div> <div>BOOKED</div> <div>0</div> | <div>AVAILABLE</div> <div>0</div> <div>BOOKED</div> <div>0</div> | <div>AVAILABLE</div> <div>0</div> <div>BOOKED</div> <div>0</div> |
| 08:50 | <div>AVAILABLE</div> <div>0</div> <div>BOOKED</div> <div>0</div> | <div>AVAILABLE</div> <div>0</div> <div>BOOKED</div> <div>0</div> | <div>AVAILABLE</div> <div>0</div> <div>BOOKED</div> <div>0</div> |
| 09:05 | <div>AVAILABLE</div> <div>0</div> <div>BOOKED</div> <div>0</div> | <div>AVAILABLE</div> <div>0</div> <div>BOOKED</div> <div>0</div> | <div>AVAILABLE</div> <div>0</div> <div>BOOKED</div> <div>0</div> |
| 09:20 | <div>AVAILABLE</div> <div>0</div> <div>BOOKED</div> <div>0</div> | <div>AVAILABLE</div> <div>0</div> <div>BOOKED</div> <div>0</div> | <div>AVAILABLE</div> <div>0</div> <div>BOOKED</div> <div>0</div> |
| 09:35 | <div>AVAILABLE</div> <div>0</div> <div>BOOKED</div> <div>0</div> | <div>AVAILABLE</div> <div>0</div> <div>BOOKED</div> <div>0</div> | <div>AVAILABLE</div> <div>0</div> <div>BOOKED</div> <div>0</div> |
|       | <div>AVAILABLE</div> <div>0</div>                                | <div>AVAILABLE</div> <div>0</div>                                | <div>AVAILABLE</div> <div>0</div>                                |

- Next you will enter the number of available time slots for that date and time into the “Enter new value” field and click **Update**.

In the example below, the number of available appointments is currently set to “0” for 12/16/20, but for this example we will change it to “33” by entering into the “Enter new value” box and clicking Update.

| Event Info   | Scheduler  | Staff  | Invitee  |
|--|--|--|--|
| <div> <input type="text" value="33"/> <input type="button" value="UPDATE"/> <div>12/16/2020</div> </div> |  |  |  |
|  | 12-16-2020   | 12-17-2020   | 12-18-2020   |
| 08:35  | <div>AVAILABLE<br/>0</div> <div>BOOKED<br/>0</div> | <div>AVAILABLE<br/>0</div> <div>BOOKED<br/>0</div> | <div>AVAILABLE<br/>0</div> <div>BOOKED<br/>0</div> |
| 08:50  | <div>AVAILABLE<br/>0</div> <div>BOOKED<br/>0</div> | <div>AVAILABLE<br/>0</div> <div>BOOKED<br/>0</div> | <div>AVAILABLE<br/>0</div> <div>BOOKED<br/>0</div> |
| 09:05  | <div>AVAILABLE<br/>0</div> <div>BOOKED<br/>0</div> | <div>AVAILABLE<br/>0</div> <div>BOOKED<br/>0</div> | <div>AVAILABLE<br/>0</div> <div>BOOKED<br/>0</div> |
| 09:20  | <div>AVAILABLE<br/>0</div> <div>BOOKED<br/>0</div> | <div>AVAILABLE<br/>0</div> <div>BOOKED<br/>0</div> | <div>AVAILABLE<br/>0</div> <div>BOOKED<br/>0</div> |
| 09:35  | <div>AVAILABLE<br/>0</div> <div>BOOKED<br/>0</div> | <div>AVAILABLE<br/>0</div> <div>BOOKED<br/>0</div> | <div>AVAILABLE<br/>0</div> <div>BOOKED<br/>0</div> |
|  | <div>AVAILABLE<br/>0</div>                         | <div>AVAILABLE<br/>0</div>                         | <div>AVAILABLE<br/>0</div>                         |

Notice that the number of appointments updated for just the 12/16/2020 at 8:35am time slot.

| Event Info   | Scheduler   | Staff  | Invitee  |
|--|---|--|--|
| <div> <input type="text" value="33"/> <input type="button" value="UPDATE"/> <div>12/16/2020</div> </div> |   |  |  |
|  | 12-16-2020  | 12-17-2020   | 12-18-2020   |
| 08:35  | <div>AVAILABLE<br/>33</div> <div>BOOKED<br/>0</div> | <div>AVAILABLE<br/>0</div> <div>BOOKED<br/>0</div> | <div>AVAILABLE<br/>0</div> <div>BOOKED<br/>0</div> |
| 08:50  | <div>AVAILABLE<br/>0</div> <div>BOOKED<br/>0</div>  | <div>AVAILABLE<br/>0</div> <div>BOOKED<br/>0</div> | <div>AVAILABLE<br/>0</div> <div>BOOKED<br/>0</div> |
| 09:05  | <div>AVAILABLE<br/>0</div> <div>BOOKED<br/>0</div>  | <div>AVAILABLE<br/>0</div> <div>BOOKED<br/>0</div> | <div>AVAILABLE<br/>0</div> <div>BOOKED<br/>0</div> |
| 09:20  | <div>AVAILABLE<br/>0</div> <div>BOOKED<br/>0</div>  | <div>AVAILABLE<br/>0</div> <div>BOOKED<br/>0</div> | <div>AVAILABLE<br/>0</div> <div>BOOKED<br/>0</div> |
| 09:35  | <div>AVAILABLE<br/>0</div> <div>BOOKED<br/>0</div>  | <div>AVAILABLE<br/>0</div> <div>BOOKED<br/>0</div> | <div>AVAILABLE<br/>0</div> <div>BOOKED<br/>0</div> |
|  | <div>AVAILABLE<br/>0</div>                          | <div>AVAILABLE<br/>0</div>                         | <div>AVAILABLE<br/>0</div>                         |

## Method 2: Allocate for an Appointment Time Over Multiple Days

1. To save time, you can change the number of available appointments for an entire row of time slots for multiple dates. Click on one of the time slots in the left column with times listed. In the example below, the 08:50 time row was selected.

You can also click on multiple slots to update them at the same time.

In the example below, the entire 08:50 row was selected, as well as multiple individually selected time slots. You know a time slot(s) has been selected when they are highlighted in yellow.

Every time slot highlighted in yellow will be updated when availability is updated. Appointments highlighted in green (or not highlighted) will not be affected by the update.

| Event Info | Scheduler                      | Staff                         | Invitee                       |
|------------|--------------------------------|-------------------------------|-------------------------------|
| 33         | UPDATE                         |                               | 12/16/2020                    |
|            | 12-16-2020                     | 12-17-2020                    | 12-18-2020                    |
| 08:35      | AVAILABLE<br>33<br>BOOKED<br>0 | AVAILABLE<br>0<br>BOOKED<br>0 | AVAILABLE<br>0<br>BOOKED<br>0 |
| 08:50      | AVAILABLE<br>0<br>BOOKED<br>0  | AVAILABLE<br>0<br>BOOKED<br>0 | AVAILABLE<br>0<br>BOOKED<br>0 |
| 09:05      | AVAILABLE<br>0<br>BOOKED<br>0  | AVAILABLE<br>0<br>BOOKED<br>0 | AVAILABLE<br>0<br>BOOKED<br>0 |
| 09:20      | AVAILABLE<br>0<br>BOOKED<br>0  | AVAILABLE<br>0<br>BOOKED<br>0 | AVAILABLE<br>0<br>BOOKED<br>0 |
| 09:35      | AVAILABLE<br>0<br>BOOKED<br>0  | AVAILABLE<br>0<br>BOOKED<br>0 | AVAILABLE<br>0<br>BOOKED<br>0 |
|            | AVAILABLE<br>0                 | AVAILABLE<br>0                | AVAILABLE<br>0                |

- To update availability, enter the number of appointments you want to make available for those dates & times into the **Enter new value** field.

In the example below, the number of available appointments was changed from 0 to 5.

| Event Info | Scheduler                      | Staff                         | Invitee                       |
|------------|--------------------------------|-------------------------------|-------------------------------|
| 5          | UPDATE                         |                               | 12/16/2020                    |
|            | 12-16-2020                     | 12-17-2020                    | 12-18-2020                    |
| 08:35      | AVAILABLE<br>33<br>BOOKED<br>0 | AVAILABLE<br>0<br>BOOKED<br>0 | AVAILABLE<br>0<br>BOOKED<br>0 |
| 08:50      | AVAILABLE<br>5<br>BOOKED<br>0  | AVAILABLE<br>5<br>BOOKED<br>0 | AVAILABLE<br>5<br>BOOKED<br>0 |
| 09:05      | AVAILABLE<br>0<br>BOOKED<br>0  | AVAILABLE<br>0<br>BOOKED<br>0 | AVAILABLE<br>0<br>BOOKED<br>0 |
| 09:20      | AVAILABLE<br>0<br>BOOKED<br>0  | AVAILABLE<br>5<br>BOOKED<br>0 | AVAILABLE<br>0<br>BOOKED<br>0 |
| 09:35      | AVAILABLE<br>0<br>BOOKED<br>0  | AVAILABLE<br>5<br>BOOKED<br>0 | AVAILABLE<br>5<br>BOOKED<br>0 |
|            | AVAILABLE<br>0                 | AVAILABLE<br>0                | AVAILABLE<br>0                |

### Method 3: Allocate for an Entire Day (or Multiple Entire Days)

The next example will work in a similar way, you choose an entire date and update the number of available appointment slots.

- Click on the Date Column(s) to select the date(s) you want to modify. Enter the number of appointments you want to make available for those dates into the “Enter new value” field and click **Update**.

For this example 12/17/2020 and 12/18/2020 were selected by clicking on the **Date Column** at the top of the columns. The number of available appointments will be updated from 0 or 5 to 33.

| Event Info | Scheduler                      | Staff                         | Invitee                         |            |
|------------|--------------------------------|-------------------------------|---------------------------------|------------|
| 5          | UPDATE                         |                               |                                 | 12/16/2020 |
|            | 12-16-2020                     | 12-17-2020                    | 12-18-2020                      |            |
| 08:35      | AVAILABLE<br>33<br>BOOKED<br>0 | AVAILABLE<br>0<br>BOOKED<br>0 | Select date<br>0<br>BOOKED<br>0 |            |
| 08:50      | AVAILABLE<br>5<br>BOOKED<br>0  | AVAILABLE<br>5<br>BOOKED<br>0 | AVAILABLE<br>5<br>BOOKED<br>0   |            |
| 09:05      | AVAILABLE<br>0<br>BOOKED<br>0  | AVAILABLE<br>0<br>BOOKED<br>0 | AVAILABLE<br>0<br>BOOKED<br>0   |            |
| 09:20      | AVAILABLE<br>0<br>BOOKED<br>0  | AVAILABLE<br>5<br>BOOKED<br>0 | AVAILABLE<br>0<br>BOOKED<br>0   |            |
| 09:35      | AVAILABLE<br>0<br>BOOKED<br>0  | AVAILABLE<br>5<br>BOOKED<br>0 | AVAILABLE<br>5<br>BOOKED<br>0   |            |
|            | AVAILABLE<br>0                 | AVAILABLE<br>0                | AVAILABLE<br>0                  |            |

| Event Info | Scheduler                      | Staff                          | Invitee                        |            |
|------------|--------------------------------|--------------------------------|--------------------------------|------------|
| 33         | UPDATE                         |                                |                                | 12/16/2020 |
|            | 12-16-2020                     | 12-17-2020                     | 12-18-2020                     |            |
| 08:35      | AVAILABLE<br>33<br>BOOKED<br>0 | AVAILABLE<br>33<br>BOOKED<br>0 | AVAILABLE<br>33<br>BOOKED<br>0 |            |
| 08:50      | AVAILABLE<br>5<br>BOOKED<br>0  | AVAILABLE<br>33<br>BOOKED<br>0 | AVAILABLE<br>33<br>BOOKED<br>0 |            |
| 09:05      | AVAILABLE<br>0<br>BOOKED<br>0  | AVAILABLE<br>33<br>BOOKED<br>0 | AVAILABLE<br>33<br>BOOKED<br>0 |            |
| 09:20      | AVAILABLE<br>0<br>BOOKED<br>0  | AVAILABLE<br>33<br>BOOKED<br>0 | AVAILABLE<br>33<br>BOOKED<br>0 |            |
| 09:35      | AVAILABLE<br>0<br>BOOKED<br>0  | AVAILABLE<br>33<br>BOOKED<br>0 | AVAILABLE<br>33<br>BOOKED<br>0 |            |
|            | AVAILABLE<br>0                 | AVAILABLE<br>33                | AVAILABLE<br>33                |            |

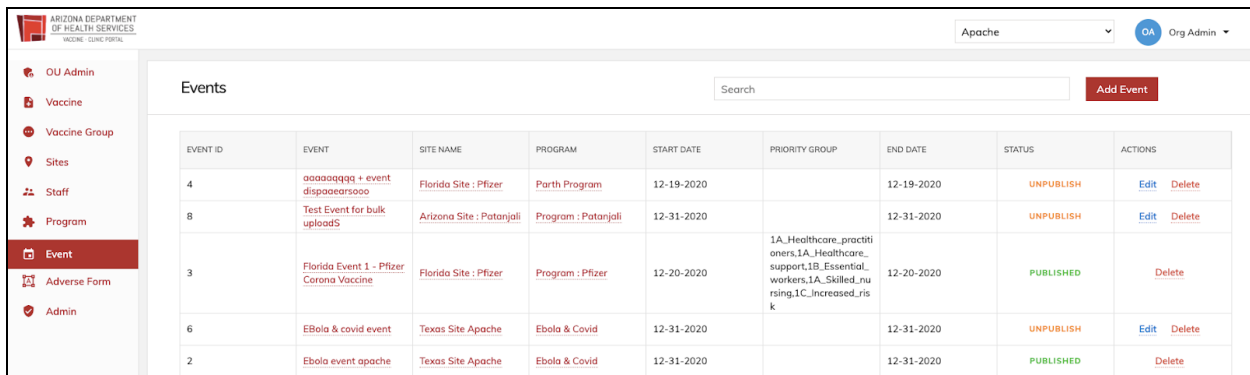
**Note:** As you get more familiar with the system, you will choose the easiest method for you to update the number of slots in the scheduler. The important thing to remember is you have options for how you choose to modify the number of available appointment slots.

**Keep in mind that the changes you make on the scheduler will update the number of available appointments that the patients can book on the Patient Portal.**

For instance, if there are 33 available appointments and a patient books 1 appointment, then the display would be: Available(32) Booked(1) for that selected slot. If a patient books slots for 4 people together (their family) then the display will be Available(29) Booked(4) for that selected slot.

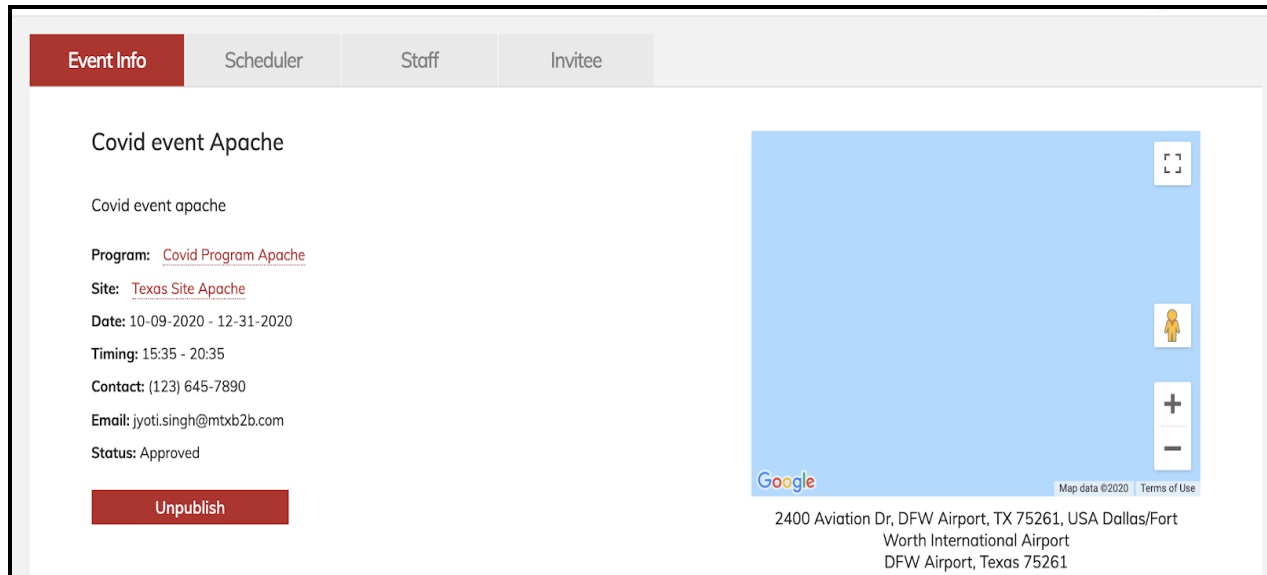
## --Assigning Staff to an Event--

1. Click the **Event** tab and click on the event in the Event column.



| EVENT ID | EVENT                                      | SITE NAME                | PROGRAM             | START DATE | PRIORITY GROUP  | END DATE   | STATUS    | ACTIONS     |
|----------|--|--------------------------|---------------------|------------|---|------------|-----------|-------------|
| 4        | aaaaaqqqq + event<br>dispaearsooo          | Florida Site : Pfizer    | Parth Program       | 12-19-2020 |   | 12-19-2020 | UNPUBLISH | Edit Delete |
| 8        | Test Event for bulk<br>uploadS             | Arizona Site : Patanjali | Program : Patanjali | 12-31-2020 |   | 12-31-2020 | UNPUBLISH | Edit Delete |
| 3        | Florida Event 1 - Pfizer<br>Corona Vaccine | Florida Site : Pfizer    | Program : Pfizer    | 12-20-2020 | 1A_Healthcare_practiti<br>oners,1A_Healthcare_<br>support,1B_Essential_<br>workers,1A_Skilled_nu<br>rsing,1C_Increased_ris<br>k | 12-20-2020 | PUBLISHED | Delete      |
| 6        | Ebola & covid event                        | Texas Site Apache        | Ebola & Covid       | 12-31-2020 |   | 12-31-2020 | UNPUBLISH | Edit Delete |
| 2        | Ebola event apache                         | Texas Site Apache        | Ebola & Covid       | 12-31-2020 |   | 12-31-2020 | PUBLISHED | Delete      |

2. The Event Info tab will display. Click on the **Staff** tab.



Event Info Scheduler Staff Invitee

Covid event Apache

Covid event apache

Program: Covid Program Apache  
Site: Texas Site Apache  
Date: 10-09-2020 - 12-31-2020  
Timing: 15:35 - 20:35  
Contact: (123) 645-7890  
Email: jyoti.singh@mtxb2b.com  
Status: Approved

Unpublish

2400 Aviation Dr, DFW Airport, TX 75261, USA Dallas/Fort Worth International Airport  
DFW Airport, Texas 75261

3. Click **Add Staff** to begin assigning staff to this event.

Event Info
Scheduler
**Staff**
Invitee

Event Staff Details
Add Staff

| NAME                    | EMAIL                                   | PHONE          | DESIGNATION             | EVENT ROLES      | ACTIONS                |
|-------------------------|---|----------------|-------------------------|------------------|------------------------|
| Naresh Agarwal          | naresh.agarwal+staff1@mtxb2b.com        | (999) 999-9999 | tester                  | Vaccinator       | <a href="#">Remove</a> |
| Clinician Apache        | pooja.sharma+apacheclinician@mtxb2b.com | (876) 543-2346 | Apache Clinician        | Vaccination Lead | <a href="#">Remove</a> |
| Clinician User Post Fix | pooja.sharma+postfix@mtxb2b.com         | (987) 654-3234 | Clinician User Post Fix | Vaccinator       | <a href="#">Remove</a> |
| Satff Userfinal2        | pooja.sharma+staffuserfinal2@mtxb2b.com | (987) 654-5678 | Satff user final2       | Site Manager     | <a href="#">Remove</a> |

4. Type in the **Staff Name** and the appropriate event role or task for this staff member. Click **Save**, to return to the Staff details page.

Assigning Staff To An Event

Event Role \*
Select Staff Name \*

Save

5. The staff member will be added to the event with an Event Role assigned. A staff member can be removed from an event by clicking **Remove** from the **Staff** tab.

Event Info
Scheduler
**Staff**
Invitee

Event Staff Details
Add Staff

| NAME                     | EMAIL                    | PHONE          | DESIGNATION      | EVENT ROLES      | ACTIONS                |
|--------------------------|--------------------------|----------------|------------------|------------------|------------------------|
| Puranjay JainApacheSatff | puranjay.jain@mtxb2b.com | (979) 912-0079 | Apache StaffUSer | Vaccinator       | <a href="#">Remove</a> |
| Jyoti Singh              | jyoti.singh@mtxb2b.com   | (123) 123-1230 | Clinician        | Vaccinator       | <a href="#">Remove</a> |
| Nikhil Gupta             | nikhil.gupta@mtxb2b.com  | (729) 103-9979 | Apache Clinician | Operations Chief | <a href="#">Remove</a> |

## --Private Event--

1. You may need to create a new event as a **Private Event** that will not be available to the public. In this scenario you would see the invitees listed on this tab.

Event Info

Scheduler

Staff

Invitee

Invitees

| NAME             | DATE OF BIRTH | GENDER | EMAIL                             | PHONE |
|------------------|---------------|--------|-----------------------------------|-------|
| Jessica1 William | 10-31-1994    | Female | naresh.agarwal+bulk11@mtxb2b.com  |       |
| Samantha1 Jones  | 11-21-1980    | Female | naresh.agarwal+bulk21@mtxb2b.com  |       |
| Mark1 Jackson    | 11-14-1976    | Male   | naresh.agarwal+bulk31@mtxb2b.com  |       |
| Samantha1 Jones  | 11-21-1980    | Female | naresh.agarwal+bulk41@mtxb2b.com  |       |
| Jessica1 William | 10-31-1994    | Female | naresh.agarwal+bulk111@mtxb2b.com |       |
| Samantha1 Jones  | 11-21-1980    | Female | naresh.agarwal+bulk211@mtxb2b.com |       |

2. To upload the list of patients to invite to the event, click the **Admin** tab on the left-hand side of the dashboard.

ARIZONA DEPARTMENT  
OF HEALTH SERVICES  
HEALTHCARE SERVICE PORTAL

OU Admin

Vaccine

Vaccine Group

Sites

Staff

Program

Event

Adverse Form

Admin

Patients Invite

Staff Upload

Admin Exports

Apache

DA Org Admin

Patient list bulk upload

Sample data

Choose File

No file chosen

Upload

Patients Invites Upload Details

| IMPORT ID | FILE NAME  | CREATED DATE | STATUS    | TOTAL RECORD | SUCCESS | ERROR |
|-----------|--|--------------|-----------|--------------|---------|-------|
| 18        | patient bulk upload.csv                                    | 12-14-2020   | COMPLETED | 11           | 10      | 1     |
| 17        | patient bulk upload.csv                                    | 12-14-2020   | COMPLETED | 11           | 11      | 0     |
| 16        | patient bulk upload.csv                                    | 12-14-2020   | COMPLETED | 11           | 11      | 0     |
| 15        | patient bulk upload.csv                                    | 12-14-2020   | COMPLETED | 11           | 7       | 4     |
| 14        | patient bulk upload.csv                                    | 12-14-2020   | COMPLETED | 4            | 4       | 0     |
| 13        | Patient Bulk Upload.xlsx - Patient Bulk Upload.xls (1).csv | 12-13-2020   | COMPLETED | 1            | 1       | 0     |
| 12        | Patient Bulk Upload.xlsx - Patient Bulk Upload.xls (1).csv | 12-13-2020   | COMPLETED | 1            | 1       | 0     |

3. Choose the file (the invitee list for the private event) and click **Upload**. Instructions for creating a comma delimited (csv) file to upload are in the [Appendix](#).

| <b>Patients Invite</b>  | Staff Upload | Admin Exports |           |           |              |
|---|--------------|---------------|-----------|-----------|--------------|
| Patient list bulk upload <a href="#">Sample data</a><br><input type="button" value="Choose File"/> No file chosen <input type="button" value="Upload"/> |              |               |           |           |              |
| Patients Invites Upload Details <table> <tr> <th>IMPORT ID</th> <th>FILE NAME</th> <th>CREATED DATE</th> </tr> </table>                                 |              |               | IMPORT ID | FILE NAME | CREATED DATE |
| IMPORT ID   | FILE NAME    | CREATED DATE  |           |           |              |



## -- Publishing an Event --

**Please ensure the details of an event have been finalized before publishing. At this time, unpublishing an event to edit it may cause the loss of event data.**

1. When you're ready to make an event available for patients to book, click on the **name of the event** you would like to publish from the Event column.

| Events   |   |                                       |                                   |            |   |            |           |   |
|----------|---|---------------------------------------|-----------------------------------|------------|---|------------|-----------|---|
|          |   |                                       |                                   |            | Search  | Add Event  |           |   |
| EVENT ID | EVENT   | SITE NAME                             | PROGRAM                           | START DATE | PRIORITY GROUP  | END DATE   | STATUS    | ACTIONS                                     |
| 1        | <a href="#">PVT 1</a>                                   | <a href="#">Florida Site : Pfizer</a> | <a href="#">Parth Program</a>     | 12-13-2020 |   | 12-19-2020 | PUBLISHED | <a href="#">Delete</a>                      |
| 2        | <a href="#">Ebola event apache</a>                      | <a href="#">Texas Site Apache</a>     | <a href="#">Ebola &amp; Covid</a> | 12-13-2020 |   | 12-31-2020 | UNPUBLISH | <a href="#">Edit</a> <a href="#">Delete</a> |
| 3        | <a href="#">Florida Event 1 - Pfizer Corona Vaccine</a> | <a href="#">Florida Site : Pfizer</a> | <a href="#">Program : Pfizer</a>  | 12-15-2020 | 1A_Healthcare_practitioners,1A_Healthcare_support,1B_Essential_workers,1A_Skilled_nursing,1C_Increased_risk | 12-20-2020 | PUBLISHED | <a href="#">Delete</a>                      |
| 4        | <a href="#">aaaaaqqq + event disappearsoo</a>           | <a href="#">Florida Site : Pfizer</a> | <a href="#">Parth Program</a>     | 12-13-2020 |   | 12-19-2020 | UNPUBLISH | <a href="#">Edit</a> <a href="#">Delete</a> |
| 5        | <a href="#">Test Event</a>                              | <a href="#">Texas Site Apache</a>     | <a href="#">Parth Program</a>     | 12-13-2020 |   | 12-31-2020 | UNPUBLISH | <a href="#">Edit</a> <a href="#">Delete</a> |
| 6        | <a href="#">Ebola &amp; covid event</a>                 | <a href="#">Texas Site Apache</a>     | <a href="#">Ebola &amp; Covid</a> | 12-13-2020 |   | 12-31-2020 | UNPUBLISH | <a href="#">Edit</a> <a href="#">Delete</a> |

2. Click the **Event Info** tab. Click on **Publish** to make the event live so patients can schedule appointments for the event.

|                   |           |       |         |
|-------------------|-----------|-------|---------|
| <b>Event Info</b> | Scheduler | Staff | Invitee |
|-------------------|-----------|-------|---------|

Fun Event #2

Program: [Program : Pfizer](#)

Site: [Test Site Final](#)

Date: 12-16-2020 - 12-25-2020


Timing: 15:10 - 16:10

Contact: (938) 493-8999

Email: email@gmail.com

Status: Draft

[Publish](#) [Edit](#)



333 fun street  
Phoenix, AZ 85001

If you are an Organizational Administrator and need assistance with the system, please email [podvaccine-triage@azdhs.gov](mailto:podvaccine-triage@azdhs.gov). If you are a Site Administrator and need assistance, please contact your Organizational Administrator.

## -- Appendix --

### PATIENT BULK UPLOAD INSTRUCTIONS

Patients can be invited to private events using a comma delimited(csv) file similar to the sample listed below. This sample is also available on the website under the Admin section.

#### Sample File

```
event_id,First Name,Last Name,DOB,Gender,Email,Street Address,City,State,Zip Code
1,Jessica,William,10/31/1994,Female,patient1.bulk8@mailinator.com,123 Main Street,Phoenix,AZ,85001
1,Samantha,Jones,11/21/1980,Female,patient2.bulk8@mailinator.com,20 Boulevard Road,Phoenix,AZ,85002
1,Mark,Jackson,11/14/1976,Male,patient3.bulk8@mailinator.com,,,,,
```

#### Tabular version of the sample data

| event_id | First Name | Last Name | DOB        | Gender | Email                         | Street Address    | City    | State | Zip Code |
|----------|------------|-----------|------------|--------|-------------------------------|-------------------|---------|-------|----------|
| 1        | Jessica    | William   | 10/31/1994 | Female | patient1.bulk8@mailinator.com | 123 Main Street   | Phoenix | AZ    | 85001    |
| 1        | Samantha   | Jones     | 11/21/1980 | Female | patient2.bulk8@mailinator.com | 20 Boulevard Road | Phoenix | AZ    | 85002    |
| 1        | Mark       | Jackson   | 11/14/1976 | Male   | patient3.bulk8@mailinator.com |                   |         |       |          |

#### Additional Instructions

1. The header information should not be changed or removed.
2. You can **only** upload a **.csv** and not a **.xlsx** file or other file formats.
3. Please make note of the event ID of the private event on the Event tab that the patients are being invited to and list it in the first column.
4. The First Name, Last Name, DOB, Gender, Email are mandated/required information. The Street Address, City, State, Zip code are optional information.
5. The address can include spaces but not commas.
6. Avoid additional spaces before or after the comma delimiters.



## STAFF BULK UPLOAD INSTRUCTIONS

Staff, Clinicians and Site Admins can be added into the system by OU Admin/Site Admin using a comma delimited(csv) file similar to the sample listed below. This sample is also available on the website under the Admin section.

### Sample File

First Name,Last Name,Email,Primary Phone Number,Professional Title,OU,Role

Katie,Park,staff1bulk9@mailinator.com,(541) 754-3010,Doctor,Apache,Staff

Joe,Doe,staff2bulk9@mailinator.com,(541) 754-3010,Nurse,Apache,Clinician

Jessica,Bulk,staff3bulk9@mailinator.com,(541) 754-3010,Medical Assistant,Apache,Site Admin

### Tabular version of the sample data

| First Name | Last Name | Email                      | Primary Phone Number | Professional Title | OU     | Role       |
|------------|-----------|----------------------------|----------------------|--------------------|--------|------------|
| Katie      | Park      | staff1bulk9@mailinator.com | (541) 754-3010       | Doctor             | Apache | Staff      |
| Joe        | Doe       | staff2bulk9@mailinator.com | (541) 754-3010       | Nurse              | Apache | Clinician  |
| Jessica    | Bulk      | staff3bulk9@mailinator.com | (541) 754-3010       | Medical Assistant  | Apache | Site Admin |

### Additional Instructions

1. The header information should not be changed or removed.
2. You can **only** upload a **.csv** and not a **.xlsx** file or other file formats.
3. The phone number format has to be (xxx) xxx-xxxx.
4. Avoid additional spaces before or after the comma delimiter. All fields are mandated/required.
5. Site Assignment – after upload, Site Admin can be assigned to a site by an OU Admin
6. Event Assignment – after upload, staff and clinicians can be assigned to one or more events by a Site Admin or OU Admin.

Staff Details

First name \*  
John

Last name \*  
Smith

Email \*  
staff2bulk9@mailinator.com

Phone number \*  
(541) 754-3010

Professional Title \*  
Nurse

Role \*  
Site Admin

Filter

- ☐ Site 3
- ☐ Site 2
- ☐ Site 4